

<https://www.wealthmanagement.com/technology/helios-introduces-custom-sleeving-capabilities>



Helios CEO Chris Shuba

## TECHNOLOGY

### **Helios Introduces Custom Sleeving Capabilities**

**Advisors now have the ability to customize the firm's model portfolios to reflect their or their clients' personal preferences.**

Rob Burgess | Jul 11, 2023

Sacramento, Calif.-based Helios, a quantitative asset management firm that provides an outsourced chief investment officer offering to advisors, has launched new sleeving capabilities, giving advisors the ability to customize the firm's model portfolios to reflect their or their clients' personal preferences.

Helios builds its portfolios as model "types," so the new sleeving capability will allow advisors to group these models within a portfolio as they see fit. Advisors using Helios now can selectively enable or disable sleeves in their models depending on their preferences. It also provides performance back-testing.

It's offered in a unified managed account.

"Each strategy can be accounted for in a sleeve, and these new capabilities Helios offers will allow the advisor to select sleeves/strategies that best

reflect their client's desires while also being able to toggle in and out of that strategy as market conditions or their clients' preference dictates," said Chris Shuba, Helios founder and CEO.

Shuba said Helios decided several years ago to turn its business model toward customization. Previously, Shuba said it offered only prebuilt quantitative investment models.

"We started to notice over the years just how much variety that our advisors were looking for," he said. "More and more as we grew, we found that a simple, menu of pre-existing models really wasn't enough to serve a wide variety of advisors that are out there."

Sleeving takes advisors' individual preferences into account, Shuba said.

"Maybe they have a desire to invest in alternatives that our math isn't calling for at the moment," said Shuba. "Or maybe they want to have a static, constant allocation to a certain asset class because that's their preference. What the sleeve does is it allows that advisor to take a preference they have and make sure that it's in the model. The model will build itself around the sleeve or the preference."

In the past, only the most affluent investors even had the means to inquire about sleeves, said Jack Hannah, COO of enterprise technology and TAMP at GeoWealth.

"(They) were traditionally very expensive to high-net-worth clients to get access," said Hannah.

Helios' sleeving service is available for all its users, and account size minimums would be decided by the advisors, said Shuba.